THE Association AGENDA
PUBLISHED BY THE CANADIAN SOCIETY OF ASSOCIATION EXECUTIVES Editor Bob Hamp Email b.hamp@csae.com

September 7, 2004 www.csae.com

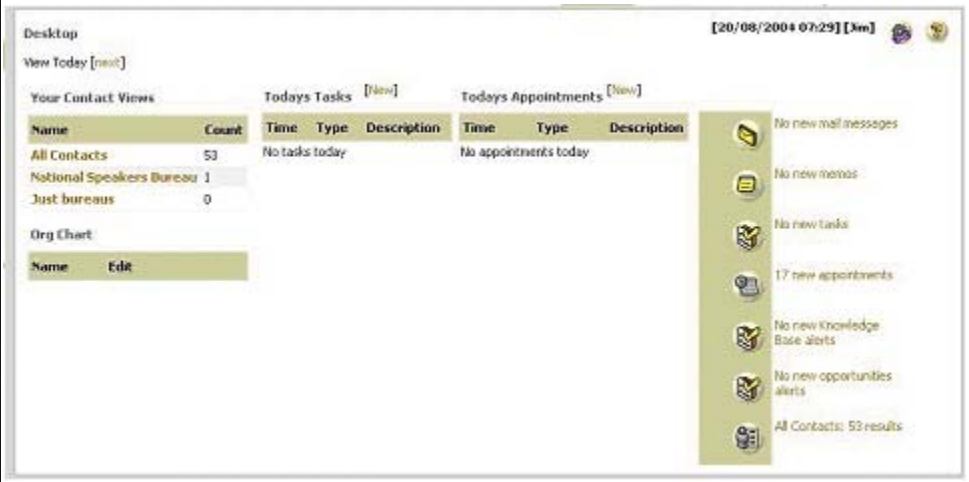
Improve your efficiency with a CRM

If you are like many associations, you are likely struggling with the day to day management of many of your activities, such as scheduling, information sharing, and the sending of broadcast messages to your members or other contacts.

That's where a CRM ("customer relationship management") program with Intranet features can be extremely useful. Don't let the word "customer" turn you off – such a tool can be a very powerful addition to your association infrastructure, regardless of your size.

Over the last few years, many CRM software suites have migrated to the Web, such that you can access them via your Web browser. What this means is that any of your staff, executives, board members and committee members can access important information regardless of where they might be. This would allow you to establish an easily accessible scheduling program that all staff and executives can use; a database of contacts that can be shared; or an internal Intranet that you can use to post documents, reports and other information.

Imagine having the capability of establishing an online document repository of critical Board reports and documents, available only to members of your Board of Directors. Or think about the benefit of having a simple method of sending a customized e-mail message to hundreds of your members, simply through pressing a few keystrokes. Or of having the ability to host an online Web discussion that various committee members can access in order to discuss and review certain key initiatives.



Imagine doing all this for just a few thousand dollars per year. That's what I've found with a program out of Wellington, New Zealand – BrowserCRM.

Solving my office problems

I spent quite a bit of time looking around for a solution for my own information management needs in the last few months, and I can't say enough good things about this product. It has rapidly become the cornerstone of my home-office operation.

I certainly knew it was time that I obtain a better information / contact / scheduling management tool that what we had been using. I've been working at home for 15 years, and my wife Christa has been helping me out for the last 10. We've made do in terms of office management with a variety of tools from the 90's, but I had the growing suspicion in my mind that we needed something more sophisticated and flexible. Not to mention the fact that I needed something that would allow me access while on the road.

We had planned for quite some time to find a better solution to our problem, but we were finally pushed into

action this summer after we experienced a major scheduling problem.

Early in the summer, we started watching my schedule for the fall – I'm doing keynotes and workshops in London, England and Stockholm; Montreal, Ottawa and Chicago; Saint John and New York. Those are confirmed engagements; there are always a number of "holds" and "inquiries" for any given month as well, so simply keeping on top of the schedule can be a challenge.

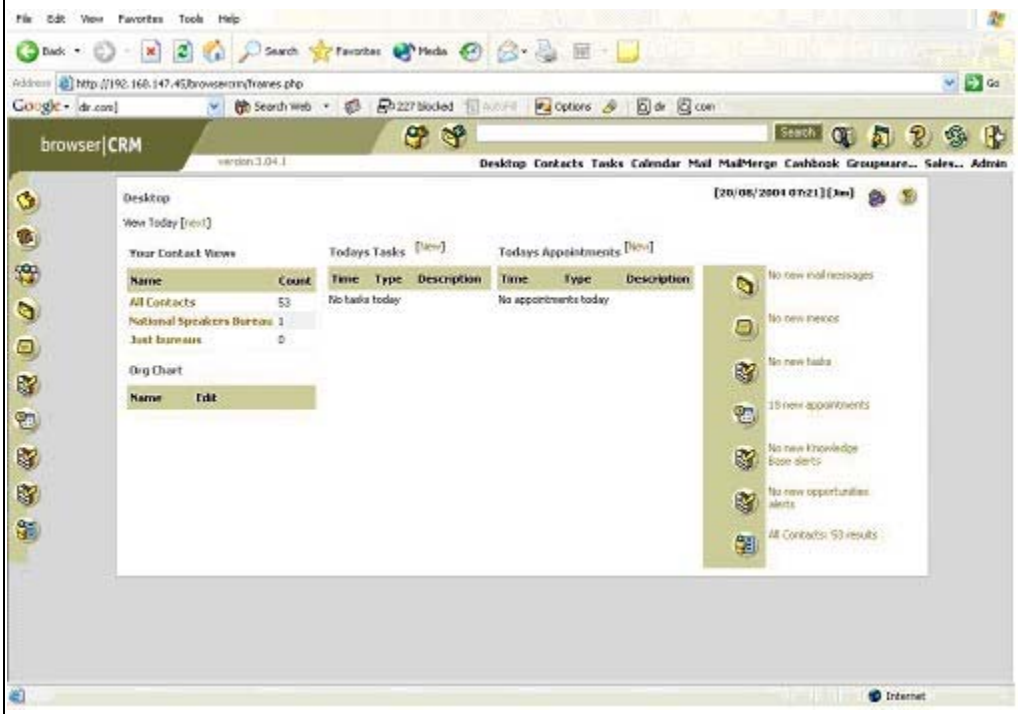
Mid-July, we had an inquiry to see if I might also be able to go to Orlando to speak to a group of Japanese executives. My calendar told me the date was OK, and so I advised the speaker's bureau that it was a go. Yet I discovered to my horror a week later, when reviewing my paper files, that I was already booked on that date. It was a scheduling mix-up that occurred simply because I had not updated my old-fashioned calendar.

That's when it became obvious that we needed to fix things around here, and so I began looking around at a wide variety of groupware tools.

After an extensive search and after a lot of testing of actual software, I finalized on the use of BrowserCRM.

What's included?

BrowserCRM certainly does it all -- contact management, calendar management, a nifty little Intranet for the exchange of notes, documents and other files, full mail-merge capabilities, the ability to create online forums -- you name it, and there are many, many extremely useful office management tools in here, useful for any association large or small! And since you access it through a Web browser, it can be made accessible to anyone.



Once you dig into the program, you will become quite amazed as to what you can do; let's go through a laundry list of potential applications:

• an internal Intranet. Within BrowserCRM, you get an area where staff or members can post reports, documents, notes, and other information for access by others. This can be an extremely powerful tool for information sharing, and used properly, could help you substantially reduce your cost of document distribution. And since you can restrict access to certain documents to particular groups, you could have one Intranet area only for staff, and another aimed only at your members. You can also define who can post new documents, as well as who can edit those documents.
• Online forum: this is where you can host a wide variety of internal or external discussions on any number of topics. (This type of capability is also known as a Web discussion board) Any member can start a new forum topic, and the same type of security restrictions exist. Hence, you can have any number of forums on any number of topics, aimed at any number of members.
• Knowledge base. This also acts as a central document repository; you can post any number of documents here, but the key difference is that they are now available for searching by all other members. Hence, this can

become your own little “search engine” of critical, important documents.
• Online Conference. This allows you to host an online, real time conference. Simply create a new conference, advise the members who should be notified to participate, and in a matter of seconds, you can be having an instant, online discussion.
• Contact database. This is a full featured database of all your contacts. You can list your association members, staff, suppliers, each of whom is assigned to a particular group. This information then becomes the engine for the mail-merge and calendaring systems that are mentioned below.
• Mail-merge. This capability allows you to select a group of people from your contact database, and quickly generate an individually customized message for them. With the touch of a button, you automatically send it out via e-mail. This could be an extremely powerful and useful tool for communications to your membership base. (You can also include attachments, which makes it even more useful!)
• Calendaring. Fully integrated with the contact database, you can use the calendar for some fairly sophisticated scheduling and appointment management. This is at the heart of what I will use the program for; the beauty of it is found in the various ways that I can view upcoming events, as well as the fact that I can choose to view other calendars (in my case, that of my wife).

Last but not least, the program features a full set of capabilities to import and export data. If your association membership database already exists in some other format, you can easily import it into BrowserCRM, and then begin using the contact information for a variety of purposes, such as mail-merge.

There are two ways that you can use the program – you can install it on your own internal network, on either a Windows or Linux server. Installation should be quite straightforward and relatively easy for your computer support group, provided that they know how to install MySQL and some other core components. The cost will depend on the number of users; a small association will pay as little as a thousand dollars or so; a large, 100 person association is looking at a higher fee. If you don’t want to go that route, you can sign up for an online version, for which you will pay a monthly fee, again dependent on the number of users. That way, you don’t need to worry about installation and support.

I've set our system up a server right next to my desk, and the system just flies. The design is clean, functional, and absolutely pleasant to work within.

BrowserCRM is gaining increasing attention in the CRM world, and rightly so. Having looked at dozens of systems, I simply found this one to be of a quality, design, and functionality that makes all the rest pale by comparison.
You can try it out with an online demo at http://www.browsercrm.com/demo.php. In addition, your tech staff can download a full, working version that will run for 14 days, so that you can really give it a good whirl.

Jim Carroll, FCA, spends his time providing his insight into issues of the future, trends, innovation and change, including within his newest keynote, “Leading the Future: Leadership in an Era of Change and Innovation.” You can contact him at jcarroll@jimcarroll.com, and learn more about his presentations at www.jimcarroll.com.

csae | scda™
CANADIAN SOCIETY OF ASSOCIATION EXECUTIVES
SOCIÉTÉ CANADIENNE DES DIRECTEURS D'ASSOCIATION

© Copyright 2004 Canadian Society of Association Executives